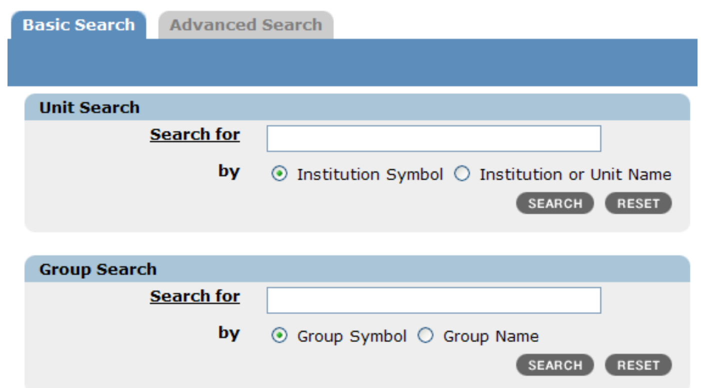
ILL Policies Directory

The OCLC Policies Directory is a central place for the loan policies of libraries using WorldCat Resource Sharing. A link to the policies directory is available from within the Resource Sharing system. It can also be accessed directly at http://illpolicies.oclc.org.

The Policies Directory allows the library to:
1. Share contact information, lending policies, closure dates, and supplier status of the library, and
2. Identify the same information about potential lenders within the WorldCat Resource Sharing system.

Searching the ILL Policies Directory

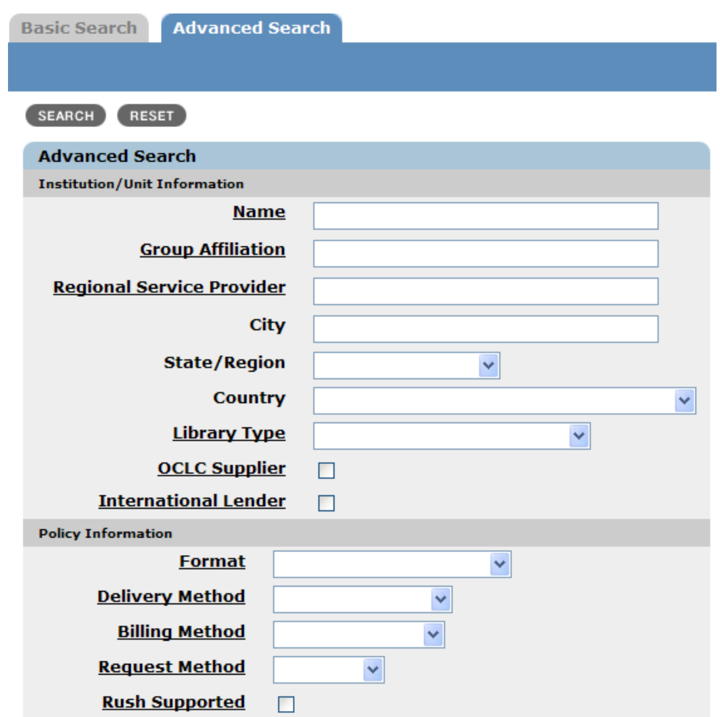
1. Log in to the directory using the WorldCat Resource Sharing authorization and password.



Upon logging in to the Policies Directory, the search options are displayed. Information on Institutions or Groups may be found in the Policies Directory.

Institutions/Units refer to a library or one of its branches. Groups refers to groups of libraries profiled by OCLC such as LVIS (Libraries Very Interested in Sharing).

<ins>Basic Search</ins>:
Search by OCLC or Group Symbol or search for keywords in the institution's or group's name.



<ins>Advanced Search</ins>:
Search in more than one field. For example, a search may be limited to libraries in Idaho that loan DVDs.

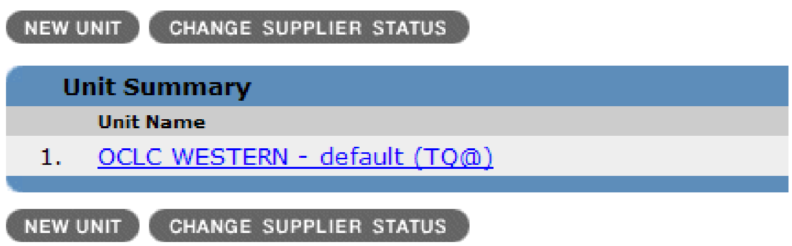
Changing Supplier Status

Supplier Status indicates an institution's lending status. That is, whether or not they are accepting inter-library loan requests for items.

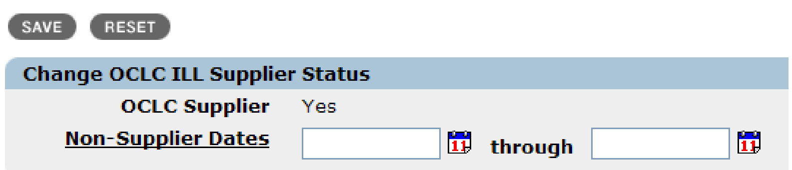
Libraries may need to temporarily stop loaning materials due to staff changes, holidays, or school breaks. If the temporary change in status is for 184 or fewer days, the change in supplier status can be made from within the Policies Directory. Longer or permanent changes should be made by contacting the OCLC Help Desk at 800-854-5753.

From any screen within the Policies Diretory, click MY UNITS at the top, right of the window. If the library has multiple units (branches) then all units for which the current account has editing privileges will be listed.

When viewing MY UNITS, click CHANGE SUPPLIER STATUS.



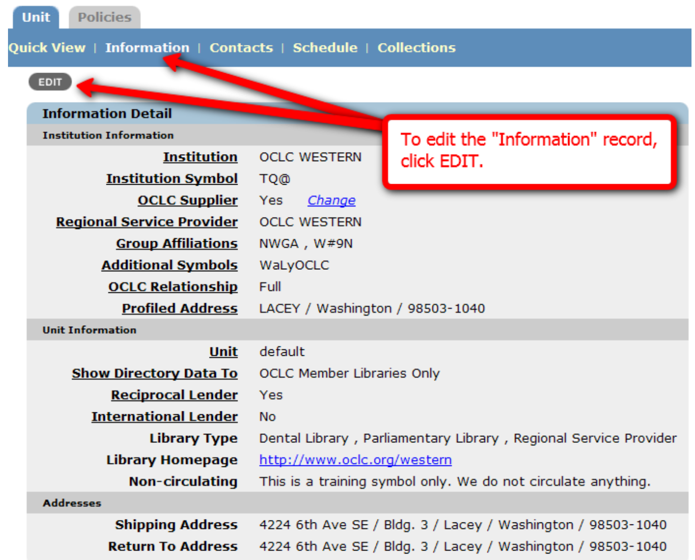
Enter the starting and ending dates during which the library will NOT loan materials. Use the calendar icon next to the data boxes to easily select from a calendar. When done, click SAVE.



Editing the Library's Unit Record

The information available within the UNIT tab provides a general overview of the library with contact information, the type of collections available, holiday schedules, and type of library.

NOTE: All edits to policies start by selecting the unit from the MY UNITS list. To select a unit, click on the hyperlinked name of the unit listed under "Unit Name."



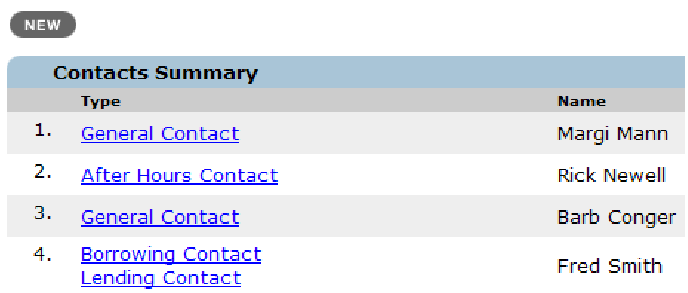
Information

1. View the Information section by clicking INFORMATION within the Unit tab.

The Information section has basic details about the library including location and type of library. To learn more about a field in the record, click the field name. A smaller window will pop up with a description.

2. Click EDIT to edit the Information details. Items that can be edited have a text box to enter the details.

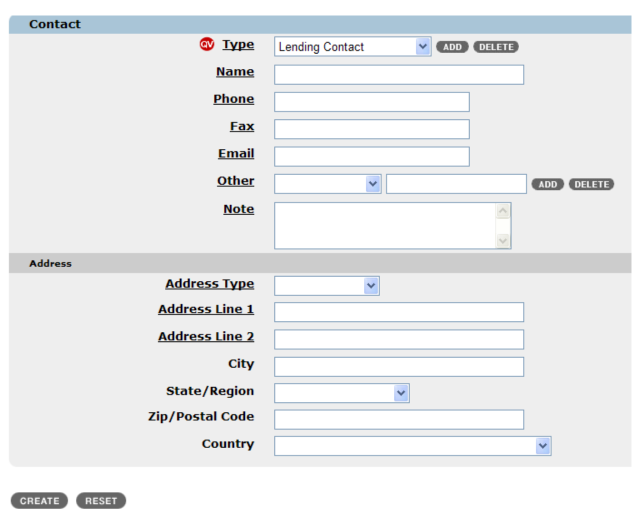
3. When done entering details, click SAVE.



Contacts

1. Click CONTACTS within the Unit tab to edit the library's contact details.

2. For existing contacts, click the hyperlinked contact type to view the individual's record. If edits are needed, click EDIT.



3. Enter updated information in the space provided, then click SAVE.

4. To add a new contact, click NEW and a blank entry form will appear.

5. Enter the information for the new contact in the space provided, then click CREATE.

6. To delete an existing contact, click DELETE in the Contacts Summary or when viewing an individual's contact record.

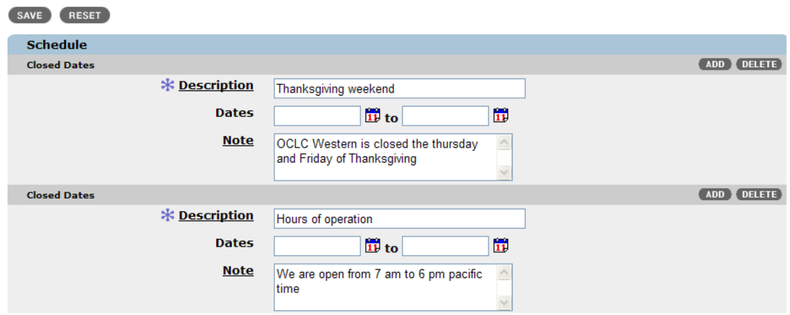
Schedule

This information allows potential borrowers to identify regular times during the year when the library is available. Libraries may choose to enter specific holidays when closures take place.

1. Click SCHEDULE within the Unit tab to view the Schedule Detail.

2. To add a new set of dates, click ADD within the record.

3. Complete the Description, Dates, and Note reflecting the library's policies. Dates and Note may be left blank.



4. When done entering or editing information, click SAVE.

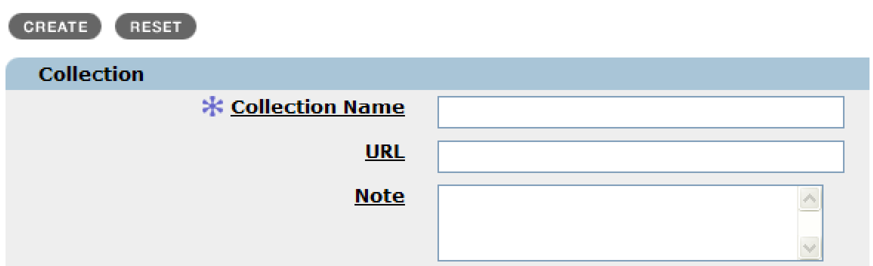
Collections

The collections area of the policies record allows the library to highlight a specific collection available. It may be a "discrete set of items held by the library such as Music or Science, or could also be a separate branch or department."

1. Click COLLECTION within the Unit tab to view the Collection Summary.

2. To add a new collection to the list, click NEW.

3. Enter the collection name, a URL if it can be accessed online, and any notes about the collection. The URL and Note may be left blank.



4. When all the information is entered, click CREATE.

5. To view the details of an existing collection, click the link for the collection in the Collection Summary list

6. To change the collection name, URL, or notes, click EDIT when viewing the Collection Detail.

7. Makes changes in the space provided, then click SAVE when done.

Editing Policies

The information within the POLICIES tab in the system allows the library to specify lending policies, fees for loans, and potential requests to deflect.

Copies

1. Click COPIES in the Policies tab to view the Copy Policies Summary.

2. To create a new Copy Policy in the system, click NEW.

3. Enter a Name for the Policy.

4. Identify the copy methods used by selecting from the drop-down box, then clicking ADD. Repeat this for each copy method used to provide copies.

5. Complete the rest of the record. Descriptions for each field are available by clicking the hyperlink for that field.

6. When done entering information, click NEXT continuing through all 3 forms of the Copy Policy record.

7. When all 3 forms of the Copy Policy record are complete, click NEXT to go to Copy Policy review, and then click CREATE to create the policy.

8. To delete a copy policy, click DELETE next to the record in the Copy Policies Summary.

9. To edit an existing policy, click the hyperlink for that policy, then click EDIT to edit the various pieces of the record.

Loans

1. Click Loans in the Policies tab to view the Loan Policies Summary.

2. To create a new Loan Policy record, click NEW

3. Complete the information requested on all 3 pages of the policy record clicking NEXT to move to the next form.

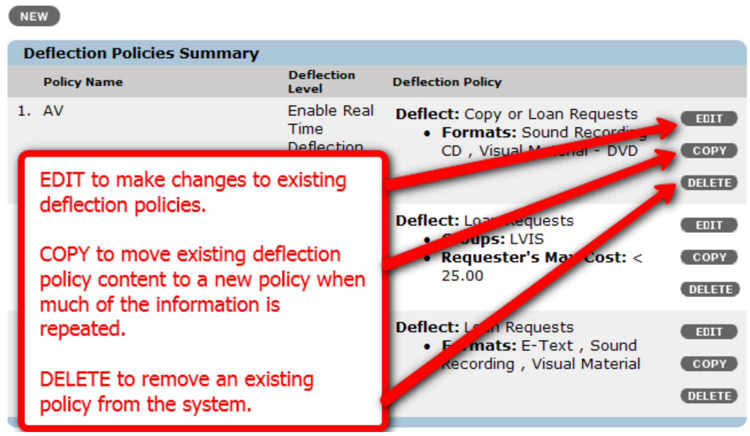
4. When all 3 forms of the Loan Policy record are complete, click NEXT to go to Loan Policy Review, and then click CREATE to create the policy.

5. To delete a copy policy, click DELETE next to the record in the Loan Policies Summary.

6. To edit an existing policy, click the hyperlink for that policy, then click EDIT to edit the various pieces of the record.

Deflections

Within the ILL Policies Directory, libraries may choose to set up automatic deflections for requests that cannot be filled due to lending policies in place. Doing this saves the library staff from having to review a request and deny it. Instead, the system bypasses the library based upon previously set up deflection policies.

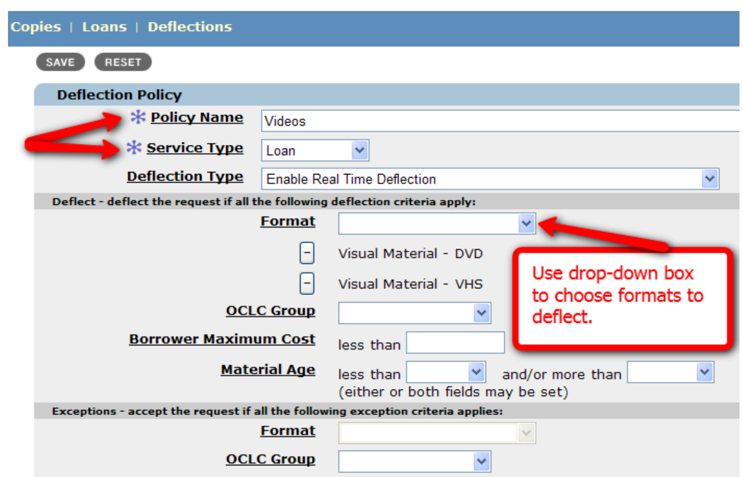


A deflection policy may be useful, for example, when a library's policy prevents loaning DVDs or VHS videos through interlibrary loan. Likewise, a library's policy may prevent loaning materials newer than 6 months through ILL.

1. Click DEFLECTIONS in the Policies tab to view the Deflection Policies Summary.

2. To create a new deflection policy, click NEW. A blank policy record will be displayed.

3. Enter the information for the deflection policy. Click on the hyperlinks for each field to see a description of the field.



- Service Type – Identifies the type of request to which the policy will be applied
- Deflection Type – Identifies whether the deflection policy will be applied in real time in the system.
- Format – Identifies the types of formats to which this policy will apply. Select from the drop-down box and the format type will be added to the list below the field. To add more than one field to the deflection record, repeat the process of selecting from the drop-down box.
- OCLC Group – Identifies group(s) from which requested would be deflected
- Material Age – Specifies the age of materials for which requests would be deflected.

4. The library may identify formats or group exceptions to the deflection rule.

5. When done entering information, click SAVE.